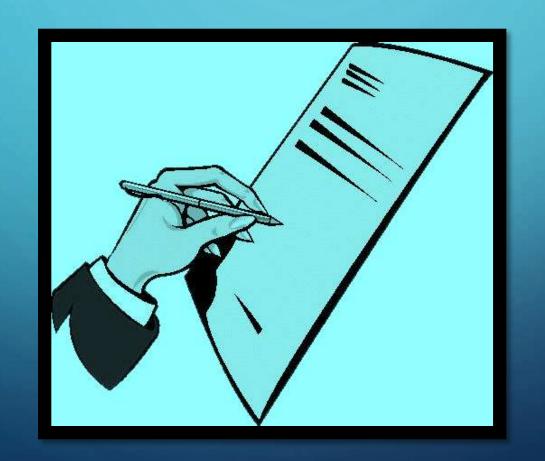# DELINQUENCY & COURT SERVICES DIVISION
WELCOMES YOU to…

DOCUMENTATION STANDARDS TRAINING

DOCUMENTATION STANDARDS TRAINING OBJECTIVES

1) **Overview of Agency Data Entry Requirements –** *By Agency & Service*

   ❑ See Handout

2) **Demonstrate Provider Note Data Entry Requirements**

   ❑ Provider Progress Notes

   - General Note Entry

   - Clinical Documentation Payor/Billing Codes

   ❑ Discharges

   ❑ Placement Services Data Entry

3) **Discussion of New Policies**

   ❑ See Handout

DOCUMENTATION STANDARDS

AGENCY DATA ENTRY REQUIREMENTS

❖ Discuss the Handout

Each agency should have a handout that identifies the following:

      1. The Agency

      2. The Programs and/or Service

      3. The Required Documentation Method for that Service

      4. The Discharge Method for that Service

❖ **Note:** Please write in edits and submit back to DCSD before departure

❖ **Note:** Some agencies are contracted with Wraparound and provide services to DCSD youth via the Wraparound contract.

DOCUMENTATION STANDARDS

PROVIDER PROGRESS NOTES DEMONSTRATION

General Provider Progress Note Entry (See Tutorial)

- ❖ Applies to all Fee For Service services
- ❖ Applies to the Juvenile Education Treatment Initiative (JETI)
  - Formerly known as Day Treatment – JETI is a New Model
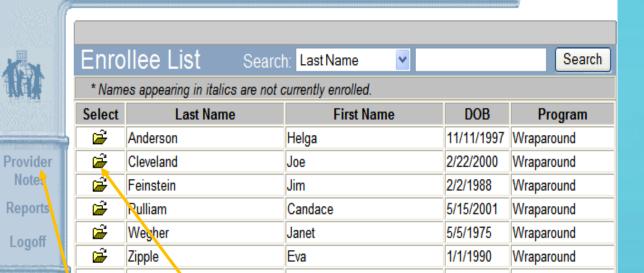 - A JETI template is used to format the progress note

SYNTHESIS DEMONSTRATION NOW

Refer to Slides 6 through 9 for reference on…
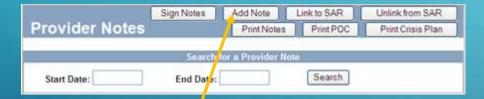
Provider General Progress Notes Data Entry Steps

PROVIDER NOTES

To Enter Notes…

1. Log in to Synthesis

2. Select the Provider Note option along the left hand column

3. Access the youth's records.

4. Click on "Add a Note"

5. Select SAR Line you are entering note for and press "Select"
   - ✓ Enter the appropriate information to complete the note

6. Use the "Insert" option after completing note
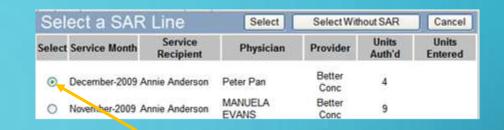
7. Use the "Done" option to save and exit the note

Enrollee List — Search: Last Name

Names appearing in italics are not currently enrolled.

Select	Last Name	First Name	DOB	Program
	Anderson	Helga	11/11/1997	Wraparound
	Cleveland	Joe	2/22/2000	Wraparound
	Feinstein	Jim	2/2/1988	Wraparound
	Pulliam	Candace	5/15/2001	Wraparound
	Wegher	Janet	5/5/1975	Wraparound
	Zipple	Eva	1/1/1990	Wraparound

Provider Notes
Reports
Logoff

2. Select Provider Notes
3. Select Youth

Select a SAR Line — Select | Select Without SAR | Cancel

Select	Service Month	Service Recipient	Physician	Provider	Units Auth'd	Units Entered
●	December-2009	Annie Anderson	Peter Pan	Better Conc	4	
○	November-2009	Annie Anderson	MANUELA EVANS	Better Conc	9	

5. Select SAR (Enter Note)

Provider Notes — Sign Notes | Add Note | Link to SAR | Unlink from SAR | Print Notes | Print POC | Print Crisis Plan

Search for a Provider Note
Start Date: ____ End Date: ____ Search

4. Select Add Note

Adam .Enrollee - Provider Notes — Insert | Cancel

Date of Contact:
Recipient: Adam .Enrollee
Contact Start Time:
Contact End Time:
Contact Location: —Select One—
Contact Time
Travel Time
Total Hours
Is enrollee being discharged? Yes ○ No ●
Service Discharge Reason: —Select One—
Date of Discharge:

Note Type: Closing Note, Collateral Contact, Consulting Psychologist/Psychiatrist, Crisis Stabilization, Crisis Supervision, Enrollee Contact, Meetings, No Show, Other

Provider Note Text

6. Click "Insert" to save the note
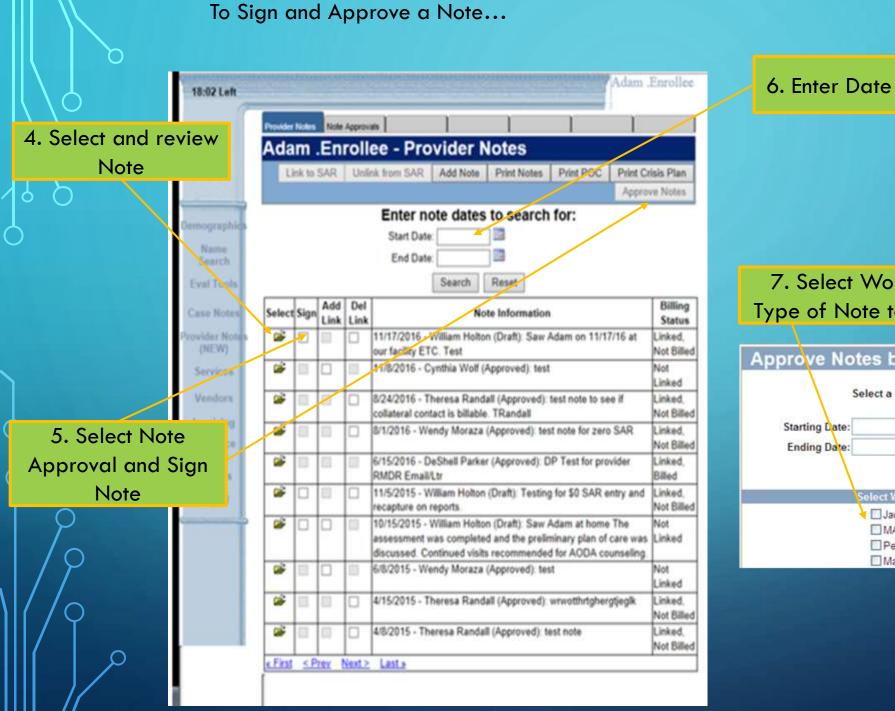
PROVIDER NOTE

To Sign and Approve a Note…

1. Log in to Synthesis

2. Select the Provider Note option along the left hand column

3. Access the youth's records.

4. Select and review notes that you are seeking to approve

5. Select the "Note Approvals" Tab at the top and Select "Sign"

6. Select date range of notes you have reviewed

7. Select the Worker and the type of notes you are seeking to approve, i.e. Signed Notes only or Draft and Signed Notes

8. Confirm the acknowledgment and approve the note(s)

To Sign and Approve a Note...

4. Select and review Note

5. Select Note Approval and Sign Note

6. Enter Date Range

7. Select Worker and Type of Note to approve

8. Confirm and Approve Note

TRANSITION

Discharge Note Data Entry Next…

PROVIDER DISCHARGE NOTES DEMONSTRATION

Discharge Methods and Data Entry (See Tutorial)

❖ Applies to **ALL** Service Providers.

❖ The difference is in HOW you document the discharge from services.

❖ Various methods of documenting discharges include:

▪ Synthesis Provider Discharge Note Entry

▪ Email to DCSD Administration (Not optional/set by Program Guidelines)

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SYNTHESIS DEMONSTRATION NOW

Refer to Slides 13 and 14 for reference on…

Provider Discharge Notes Data Entry Steps

PROVIDER DISCHARGE NOTE ENTRY

To Enter Discharge Notes…

1. Log in to Synthesis

2. Select the Provider Note option along the left hand column

3. Access the youth's records.

4. Click on "Add a Note"

5. Select "Without SAR" option for note entry
   - ✓ Enter the appropriate information to complete the note

6. Complete Note with any pertinent details, including the Note Type and select "closing note"

7. Complete the Discharge information (Is enrollee being discharged, discharge reason, discharge date)

TRANSITION

Clinical Billing Codes Review Next…

DOCUMENTATION STANDARDS

PROVIDER CLINICAL PAYOR CODE DEMONSTRATION

Clinical Documentation Payor Codes (See Tutorial)

❖ Applies to **Clinical Providers Only**

❖ THE PRIVATE PAY SERVICE AUTHORIZATION REQUEST (SAR)

▪ This is how the clinical provider can bill DCSD for the additional time needed to document the required Synthesis note for the clinical services provided to clients.

DOCUMENTATION STANDARDS
<u>**NEW BILLING CODES**</u>

The new billing codes are similar to the old codes, with slight modification of the title and code itself, e.g. the addition of "private pay" language and a "z"

❖ These codes were created for the benefit of the youth that all of us serve.

❖ The new codes allow for:

- The timely submission of data.

- Improved tracking of services.

- Measurable results to justify continuation of services.

DOCUMENTATION STANDARDS
NEW BILLING CODES

The following is a comparison of the old and new codes.

1. AODA Individual/Family Counseling   5101YAT-a (current code)

   - NEW CODE: AODA Individual/Family Counseling-Private Pay   5101YAT-z

2. Youth/Family Clinical Counseling   5118YYC-a

   - NEW CODE: Youth/Family Clinical Counseling-Private Pay   5118YYC-z

3. Sexual Assault Individual Counseling   5100YZI-a

   - NEW CODE: Sexual Assault Individual Counseling-Private Pay   5100YZI-z

❖ The NEW private pay codes are used only when a youth's service is covered by insurance.

DOCUMENTATION STANDARDS
<u>NEW BILLING CODES</u>

The following is a series of steps illustrating the process.

1. Your agency accepts the referral

2. DCSD Admin will create a SAR

3. The agency will perform the service

4. Within <u>10 business days</u>, enter the notes into Synthesis.

   ✓ You can *copy and paste* the notes from your submission to insurance.

   ✓ All Notes must be consistent with the requirements for submission to Synthesis for payment.
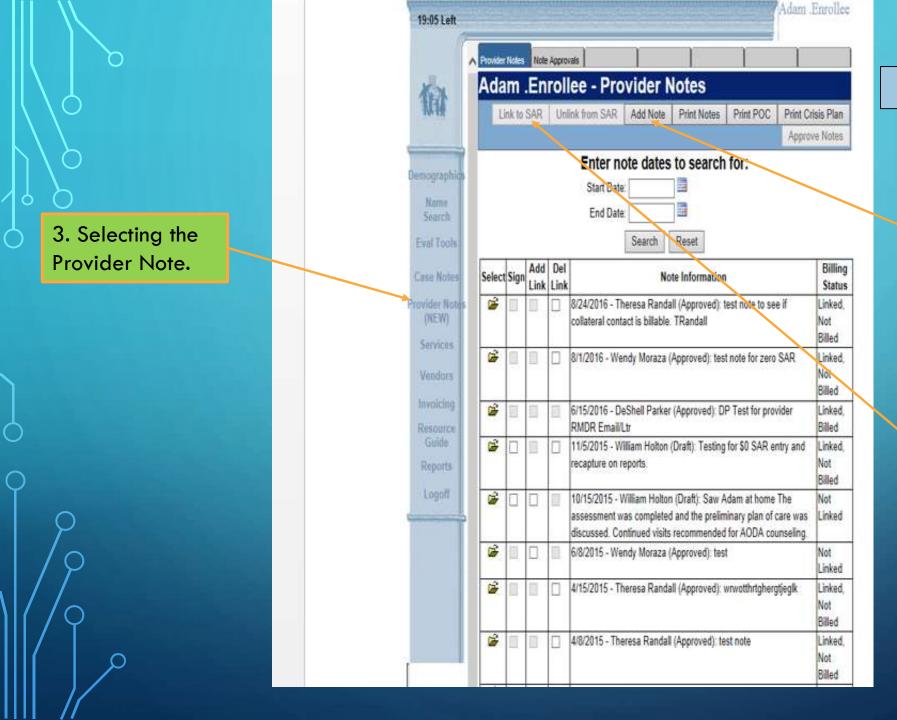
SYNTHESIS DEMONSTRATION NOW

Refer to Slides 21 through 23 for reference on…

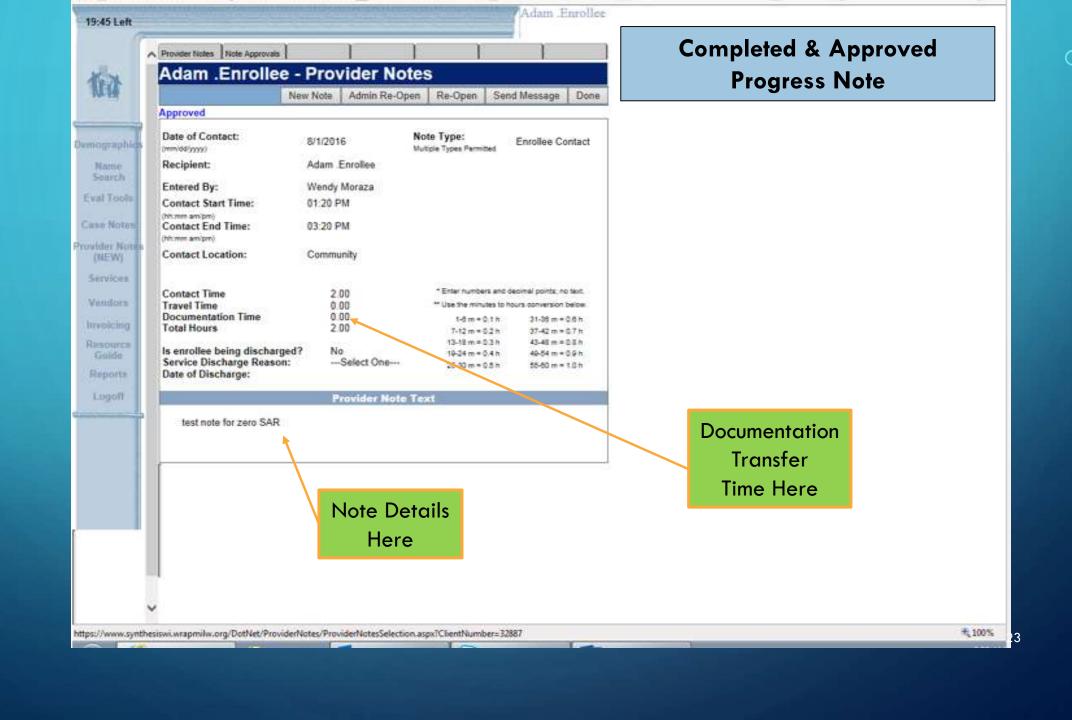*Clinical Billing Code Data Entry Steps*

NEW BILLING CODES

To Enter Notes…

1. Log in to Synthesis

2. Select the Provider Note option along the left hand column

3. Access the youth's records

4. Click on "Add a Note"

   ✓ Enter the appropriate information to complete the note

5. Then link the note to the Private Pay SAR.

   ✓ You must know which Service Authorization Request (SAR) you are linking the note to.

   ✓ Remember to list how long it takes to enter your notes.

   ✓ DCSD will be paying $.30/minute for the transferring of notes from insurance records to the Synthesis database.

3. Selecting the Provider Note.

4. Adding a New Note.

5. Linking the Note to the SAR.

NEW BILLING CODES

❖Questions or Concerns?

❖DCSD Billing Contact

▪ William Holton

▪ Fiscal Specialist DCSD

▪ (414) 257-7839 Fax (414) 257-8199

▪ William.Holton@milwaukeecountywi.gov

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TRANSITION

Placement Services Data Entry Next…

DOCUMENTATION STANDARDS

DEMONSTRATION

❖Applies to Programs that have Services "*bundled*" within them, *e.g. group homes, targeted monitoring, RCC's, etc.*

▪ *These services are limited to only those that have been classified by DCSD*

▪ *The provider cannot identify new services for data entry without prior DCSD approval*

❖Placement Services Entries – Important Considerations:

▪ Identify the Service

▪ Clarify the Start Date

▪ Clarify the End Date

❖Refer to Tutorial Guide

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DOCUMENTATION STANDARDS PLACEMENT SERVICES ENTRIES – *IMPORTANT CONSIDERATIONS*

❖Identify the Service – This refers to the *Type of Service*

❖Services are limited to the following:

- Anger Management
- AODA Education
- AODA Group
- AODA Individual Therapy

- Employment Training
- Family Therapy
- Group Therapy
- Individual Therapy
- Restorative Justice
- Sexual Abuse Treatment
- Sexuality Education
- Tutoring

DOCUMENTATION STANDARDS

PLACEMENT SERVICES ENTRIES – *IMPORTANT CONSIDERATIONS*

❖Clarify the Start Date

➤The start date IS the first date that the youth/family RECEIVED THE ACTUAL SERVICE.

➤The start date is NOT the intake date, referral receipt date, etc.

❖Clarify the End Date

➤The end date IS the LAST DAY THE SERVICE WAS RENDERED TO THE YOUTH/FAMILY.

➤The end date is NOT the last day of the month, discharge date, etc.

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SYNTHESIS DEMONSTRATION NOW
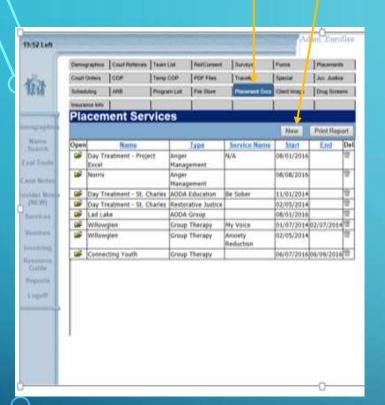
Refer to Slides 30 and 31 for reference for…

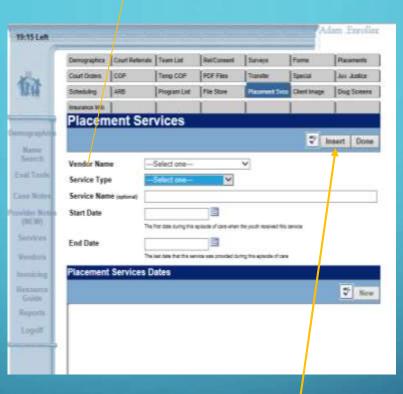*Placement Services Data Entry Steps*

PLACEMENT SERVICES DATA ENTRY

Placement Services Dosage Tab…

1. Access the youth in Synthesis

2. Click on the "Placement Services" Tab at the top of the page

3. In the Placement Services Section, enter the information for the specific service being offered, e.g. group, anger management, AODA Education, etc., including the start date
   - ✓ Note: The "End date" refers to the VERY LAST date that the youth received the services, NOT The last date that the youth the received the service during that month. Therefore, the end date may not be known initially and is usually not known until the youth has been discharged from the program/service
   - ✓ Note: This is only done once for each service rendered to the youth, i.e. group therapy is entered one time for the placement services section

4. Then, click on "insert" to save that specific service

5. In the Placement Services Dates Section, enter the specific date(s) the service was offered and the amount
   - ✓ Note: This is done as many times as the specific service was rendered to the youth, i.e. if group therapy was offered 12 times in the month, all 12 sessions should be entered in this section

6. Click "insert" after each date and dosage amount is entered for the youth to save it

7. Click "done" when the entries are completed
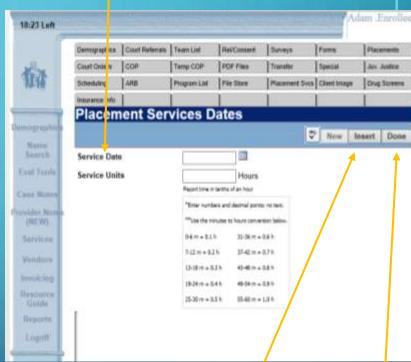
2. Click on Placement Services Tab
Click on New

3. Using drop down boxes, select correct information.

5. Enter dates and units for each service.

4. Click "Insert"

6. Click "Insert" after each data dosage is entered

7. Click "Done"

TRANSITION

Policy Review Next,

Refer to Draft Copies for discussion…

DOCUMENTATION STANDARDS

POLICIES

New

1) DCSD Provider Add/Drop Procedure 049

2) DCSD Provider General Roles & Responsibilities 050

3) DCSD Provider Continuous Quality Improvement Requirements 051

Revised

1) DCSD Provider Referral and Authorization Process 023

2) DCSD Provider Documentation and Billing Process 035

❖ Discussion and Feedback

❖ Hope to finalize polices November 30th with contracts

❖ Effective January 1st 2017

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DOCUMENTATION STANDARDS

ANY QUESTIONS ???

Please Complete the surveys…